

**SCRS SERVICE PURCHASE DEPARTMENT
PROCESS IMPROVEMENT**

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STATE DOCUMENTS

SCRS SERVICE PURCHASE DEPARTMENT

PROCESS IMPROVEMENT

The Service Purchase Department of the South Carolina Retirement Systems is tasked with the calculation of pending service purchases as requested by active members of the South Carolina Retirement System, Police Officers Retirement System, the Retirement System for the Members of the General Assembly and the Retirement System for Judges and Solicitors. There are approximately 22 service purchase types available to members of the four systems. State law governs each. In addition to the processing of thousands of service purchase requests Benefits Counselors in the Service Purchase Department are responsible for seeing visitors to discuss the options available to them and the advantages of purchasing service.

The process of purchasing service can be lengthy and confusing to customers. The statutory requirements differ with each service purchase type and often require verification from multiple parties such as, current employers, former employers, former retirement systems, the Social Security Administration, various entities that verify military service and various entities that verify federal employment and retirement. Needless to say the process can be overwhelming. As the purchase of additional service is costly it is important for customers to feel well informed and comfortable with their transaction. *"Customer relationships are a major priority of the Retirement Systems. We strive to be accessible, professional and empathetic."*¹ Obviously, achieving the highest level of customer satisfaction can be challenging when operating in the setting of a government agency. It is extremely important to continually strive for ways to improve our services and maximize the confidence of our customers.

The goal of this project is to evaluate the work processes of the Service Purchase Department and identify opportunities for improvement.

In July of 2002 a Customer Satisfaction Survey was developed incorporating the five dimensions of service quality: reliability, responsiveness, empathy, assurance and tangibles.²

¹ South Carolina Retirement Systems, Accountability Report FY 2001, p. 10.

² Allen I. Kraut, ed. *Organizational Surveys: Tools for Assessment and Change*. San Francisco: Jossey-Bass. 1996

Looks great.
Good use of flow charts and how to eliminate duplicating. Need a little more info. regarding how to measure in the future.

The survey was mailed to 92 customers of the Service Purchase Department. A copy of the survey is included in the appendix. **(See Appendix A)** The customers were randomly chosen from a list of members who purchased service from January 1, 2002 through June 30, 2002. The customers surveyed had purchased six of the most commonly requested service purchase types available to members; Withdrawal Service, Public Service, Educational Service, Approved Leave of Absence, Military Service and Non-Qualified Service. 51% of the customers surveyed responded. Overall the response was very positive, with very few complaints. Please refer to the Customer Satisfaction Survey Results reflected in the chart below.

CUSTOMER SATISFACTION SURVEY RESULTS

<u>ITEM</u>	<u>STRONGLY DISAGREE</u>	<u>DISAGREE</u>	<u>NEUTRAL</u>	<u>AGREE</u>	<u>STRONGLY AGREE</u>
SCRS Service Purchase Department responds to my requests for service in a timely manner.	2	2	0	14	29
SCRS Service Purchase Department keeps me informed about the status of my requests for service.	3	2	7	12	23
My interactions with the Service Purchase Department are handled in a professional manner.	2	0	2	11	32
The forms, documents and other written materials I receive from SCRS Service Purchase Department are clear and easy to understand.	3	1	1	23	19
SCRS Service Purchase Department shows a willingness to do whatever needs to be done to satisfy my needs.	3	3	2	11	28
SCRS Service Purchase Department sincerely tries To understand my unique needs and problems.	4	1	2	14	26

Although there were few negative responses the primary problems seemed to center around the actual process of purchasing service; written correspondence from SCRS unclear and confusing,

customers not feeling informed throughout the process, and the general feeling that SCRS was unconcerned about the customers' unique situation. It would seem that customers would appreciate service that was a bit more personalized. The same survey was used in intercept interviews with customers who came in to the office. After only a few interviews were completed it became clear that this method of surveying was not helpful. The majority of visitors to the SCRS Service Purchase Department are making their initial contact and do not yet have an opinion of the quality of our services. The visitors surveyed could only comment on the physical surroundings and the knowledge and friendliness of the counselor. The interviews seemed to make visitors uncomfortable because they felt they had nothing to add. For this reason the intercept interviews were discontinued.

good

Because of the nature of the service purchase process the huge majority of requests are processed quickly and easily, without any problems. When problems do occur with a service purchase request it can cause a great deal of confusion for the member. For this reason it was necessary to look at individual complaints rather than focusing entirely on the percentage of satisfied customers responding to the survey. Additional comments and suggestions for improvement submitted by customers responding to the survey are included in the appendix (**See Appendix B**). Again, the responses were largely complimentary and positive but the few negative responses seemed to relate to frustration with a confusing and bureaucratic process.

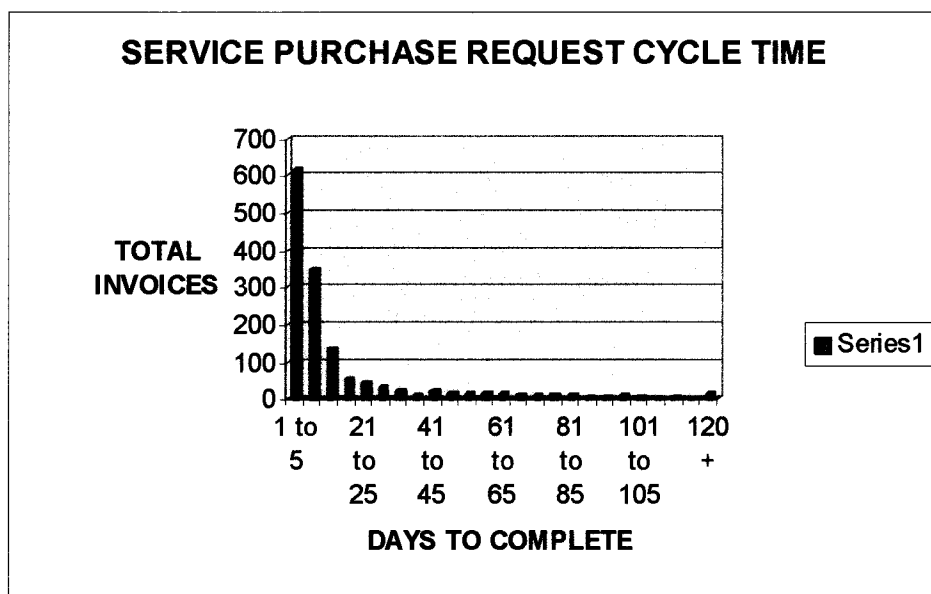
good

Notes are made electronically in a database, Customer Contact Log, whenever a member calls in or visits SCRS. The Contact Log was reviewed to determine the common types of problems customers experienced during the process. Common problems found support the types of problems already discussed in this paper. A sampling of contact log notes can be found in the appendix~~x~~ (**See Appendix C**). It provides a more detailed view of the confusion customers have experienced. A survey was also distributed to the 27 Customer Call Center and Customer Intake Counselors. A copy of this survey and the survey results are included in the appendix~~x~~ (**See Appendix D**)[✓]. Results are actually inserted into the copy of the survey in red type. Unfortunately only three of the counselors completed and returned the survey.

Wow

In an effort to determine if processing time was a problem all service purchases made from January 1, 2002 and June 30, 2002 were reviewed to determine how long it took to process the requests and issue the invoices. Although many more service purchase requests were calculated during this time, only 1,120 of them were actually purchased.

The policy of the SCRS Service Purchase Department is to complete 50% of service purchase requests within 30 days of the receipt of the request. This policy is considered reasonable because the request cannot be completed until all verification has been received, and it is the responsibility of the member to provide the required verification. Therefore, the processing time is largely out of the control of the Service Purchase Department. Nevertheless, from the 1,120 service purchases reviewed 86% of them were completed within 30 days. *Forty-six percent* ~~46%~~ of the calculations were completed within 5 days of the request. Please refer to the chart below.



When a customer remits payment for a service purchase the calculation is audited for accuracy by the Service Accounting Department. The rate of errors was also considered when evaluating opportunities for improvement. Of the 1,120 service calculations purchased 35 of them (3%) were returned to the Service Department for correction. The most recurring error experienced was service overlaps. This problem has been addressed by having the member's file audited prior to calculating the service purchase. *Good*

Visitors of the Service Purchase Department are seen on a walk in basis during the hours of 8:00 am and 5:00 pm. Prior to July of 2002 counselors were assigned a specific day of the week that they were primarily responsible for seeing visitors. Visitors usually come in with the intention of initiating a service purchase request. Service purchase calculations are assigned to the four counselors according to the last two digits in the social security number. Each counselor is assigned a set of numbers: 0-24, 25-49, 50-74 or 75-99. Visitors were not usually seen by the specific counselor who would calculate their service, but by the counselor who was assigned to see visitors on that particular day. On July 16, 2002 the procedure to assign visitors was changed to assign them based on their terminal digits, hence the counselor who would ultimately calculate their service purchase would also be consulting them in the office. The advantages to this were immediately apparent. The new policy eliminates duplication of effort because it allows the counselor responsible for calculating the member's service purchase to be the person to talk to him or her about what they want and need, to review the member's file and to make a personal connection with them. When possible the counselor can issue an invoice immediately while the member is in the office. Prior to this change if the visitor was being seen by a counselor other than the counselor assigned to their terminal digits they would have to wait to receive an invoice by mail. One of the recurring complaints from customers of SCRS is that they feel like a "number" because they have to deal with a different person each time they call or come into the office. Customers appreciate being able to talk to their counselor face to face and get a business card with that counselor's direct phone number and email address so that they can communicate with them throughout the purchase process.

A deployment flowchart was used to evaluate the efficiency of the movement of a service purchase request through the department. A copy of this flowchart is included in the appendix. **(See Appendix E)** A great deal of the responsibility falls on the intake personnel. Benefits Counselors are not even aware of a customer's interest in purchasing service until the file is complete and ready to work (all verifications are in). By this time the intake personnel have reviewed the member's file at least once and often numerous times depending on the amount of correspondence received for that file. This creates tremendous duplication of effort. After the intake personnel have reviewed the file numerous times the Benefits Counselor reviews it again

when determining eligibility to purchase service. The process as it is does not allow for the member to communicate with the counselor directly to get help with the verification process. Unless the customer comes into the office and requests a consultation they are put in the position of gaining all information through mailed correspondence or from Call Center counselors.

The second Deployment Flowchart, which includes proposed improvements, can be found in the appendix **(See Appendix F)**. This model places the responsibility for the service purchase request on the Benefits Counselor when it is received rather than when it is ready to be calculated. This would allow the counselor to assist the member with the verification process often "speeding things up" and eliminating confusing generic correspondence. Counselors can communicate with members via email and telephone to answer their questions throughout the transaction giving them more personalized and professional service. In 1997 John Solomon from the Budget and Control Board Division of Budget and Analysis reviewed the Service Purchase Department of SCRS in an effort to *"identify and correct elements of the processes within the Service section that hindered the timely response to member requests"*³ The following was included in his recommendations: *"Restructure the Service employees' jobs by creating a 'case/accounts manager position. Service employees would assume total responsibility for members' requests."*⁴ Using the system proposed on the second flowchart would require each counselor to have his or her own queue, rather than the service department having only one queue. The system is set up to accommodate this change and would not require any modifications or cost any additional money. Benefits Counselors would have to be trained on the use of the queue. Cycle time could be a concern when the volume of requests is extremely high. At the current volume this proposed process should not negatively affect cycle time. I would suggest that if cycle time became a problem the process could be reverted to the original format until the volume of requests decreased. Increasing volume of requests is prompted primarily by changes in legislation and can usually be expected and planned for in advance.

Several improvements have been implemented since this project began. Visitors are seen by Benefits Counselors in a more efficient and customer friendly manner. Service files

³ South Carolina Budget and Control Board, "A Review of The Service Section", prepared by John Solomon. February 1997, p.1.

⁴ Ibid., p.4.

are audited prior to the calculation of the request to ensure accuracy. The Imaging Department staff worked diligently to image all active member files and in the process eliminated a bottleneck in the workflow (illustrated on page 1 of the Deployment Flowchart).

In order to implement the changes reflected on the Deployment Flowchart (**See Appendix F**) reflecting proposed improvements to the process, training on the use of individual service queues would be required for the Benefits Counselors. The Intake Personnel will train the counselors on the use of a service queue.

Discussion of this implementation with the Assistant Director in charge of the department has centered on training two of the four Benefits Counselors to use the proposed changes in a pilot program. A pilot test will be implemented by June 30, 2003⁵. Two of the counselors will function in the old system and two will function in the newly proposed system. A time period for testing the process modifications has not been determined. Measuring the success of the modifications will be accomplished by using the same measurement tools used prior to testing. Customer Satisfaction surveys will be used to obtain feedback from customers receiving service purchase invoices processed in the new environment as well as in the old. Cycle time and error rate will also be measured for both and compared. Interviews with the Service Department staff to include intake personnel and counselors will be done to gauge buy-in and obtain feedback about how well or how poorly the revised process works.

Only by continually measuring the efficiency of our processes and continually searching to understand the needs and expectations of our customers can we achieve total quality. The success of this project will only be realized if it inspires us to regard process improvement as a constant and relevant exercise.

⁵ South Carolina Retirement Systems, Five-Year (FY 2003-2007) Strategic Plan. (January 2003), p. 6.

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CUSTOMER SATISFACTION SURVEY

SCRS SERVICE PURCHASE DEPARTMENT

INSTRUCTIONS:

Your opinion is important to us. We believe that our effectiveness can best be measured through your satisfaction with our services.

Please circle the number to indicate your response for each question. We are committed to honoring your privacy. Your individual responses will be kept confidential.

Please respond to the questions on page 2 of this survey.

Please place the completed survey in the envelope provided and return to us.

Do you agree or disagree with the following statements about services provided to you by the SCRS Service Purchase Department?

Please respond using the following scale:

- 1. Strongly Disagree**
- 2. Disagree**
- 3. Neutral**
- 4. Agree**
- 5. Strongly Agree**

- | | | | | | |
|---|---|---|---|---|---|
| 1. SCRS Service Purchase Department responds to my requests for service in a timely manner. | 1 | 2 | 3 | 4 | 5 |
| 2. SCRS Service Purchase Department keeps me informed about the status of my requests for service. | 1 | 2 | 3 | 4 | 5 |
| 3. My interactions with the Service Purchase Department are handled in a professional manner. | 1 | 2 | 3 | 4 | 5 |
| 4. The forms, documents and other written materials I receive from SCRS Service Purchase Department are clear and easy to understand. | 1 | 2 | 3 | 4 | 5 |

5. SCRS Service Purchase Department shows a willingness to do whatever needs to be done to satisfy my needs. 1 2 3 4 5
6. SCRS Service Purchase Department sincerely tries to understand my unique needs and problems. 1 2 3 4 5

In what ways can SCRS Service Purchase Department improve?

Additional Comments or Suggestions

Appendix B

COMMENTS SUBMITTED BY CUSTOMERS FROM CUSTOMER SATISFACTION SURVEY

ADDITIONAL COMMENTS & SUGGESTIONS

I would like for you to see if I can get this additional time for the time I served on the Ward Town Council. If additional time can be purchased I would like to do so. The copy of this letter received April 1990 is the time I am talking about.

Service credit was purchased by Clemson University for me as part of a retirement incentive plan. I had no direct contact with the Service Purchase Department and thus the survey is not applicable.

The individuals who helped me were always polite and explained anything I did not understand.

I was 5 days short for 25 years. I realize that I should have been more careful checking with my school district about my number of sick days. My husband is very ill and I felt totally overwhelmed trying to deal with so many different people. Perhaps someone could have suggested I double check about the days so that I would not have had this problem.

One time that I called one of the ladies was very short with me but most of the time everyone was very pleasant.

I appreciated the efficient response to my emails. I especially was impressed that I could talk to a person, not an automated voice system, who listened to my request and explanation and then responded in an efficient and courteous manner when I did call by phone.

I thought our Retirement System was in a lawsuit on double paying SC Inc. tax. It was my understanding that they couldn't take out twice for tax.

The service was friendly, professional and done in a timely manner. Keep up the good work. I wish other state agencies were as efficient.

Everyone I spoke with could answer all of my questions and returned calls quickly. What a joy!

Everyone was helpful, efficient and professional. Thank You!

I had a most impressive customer service experience with SCRS. All staff members I spoke with over the phone or in person were courteous, knowledgeable, and helpful. They

all seemed to enjoy their work of helping employees. Sharon Pigage was very responsive and prompt. Thank you for your excellent service.

Having taught in New York for a number of years it was incumbent upon me to get verification of years I taught there so that I could purchase them for my required 28 years in SC. That process further reinforced how lucky I was to be a resident of SC. Everyone at SCRS always acted in a professional and caring way. Although I've only lived in SC since 1982 I'm proud to be a "southerner". Congratulations to you all on a job well done.

A customer service representative by the name of Margaret deserves special recognition for handling my concerns, questions, and completion of my transaction. She was very polite as well as knowledgeable. She made me feel important and not just another customer with a SS # and a million redundant questions.

I have been very pleased with your service. Thank you for everything.

I would like to thank all of Service Purchase Department for doing a good job with my paperwork.

I was very pleased with the help of Ms. Geneva McIntosh with the info I needed.

A very positive experience, everyone was very helpful!

I was pleasantly surprised that the process worked so quickly and efficiently. Once the appropriate documentation was obtained from my previous employers the processing through Columbia was easily completed. Thank You.

Difficult to reach by phone- emails better way. Please change policy of receiving accepting faxes from prior public service employers. Mail is so slow when there's that 90 day window in which you have to be certified.

I feel that the counselors had a very flip attitude about my need to buy this time. They were good old state employees and did not try to help.

SUGGESTIONS FOR IMPROVEMENTS

They can care about their people. I bought time and after the purchase I was told by a retirement counselor I did not need to do this. I don't feel that I was given proper guidance. Also I was given no help whatsoever when I had a problem trying to buy an additional 4 months that I so dearly needed. I was told sorry you don't have time to do this.

Original service credit process took one year. Did not understand you fall out of credit purchase loop if employment verification isn't received in 90 days even though work had arrived. Customer service rep told me this office was busy and probably clerks looking up records in another state were also in the same position- ie I was lucky to have assistance at all in SC or any other state. Agreed to extend request so I could buy time at 12%. Last 1 ½ I asked for several years time to pay off \$8500.00-certificate/deduction was figured at 3 years but not explained in advance. Makes a difference when payment is so large and there is no discussion. HRM department representatives at LLR unaware that sick leave can be counted toward retirement credit once eligibility has been established. Could mean difference in someone making decision to retire or not.

None needed-service is great.

Each counselor gave me different information- Enough to confuse me about what avenue I should take as far as beneficiaries and I am still not sure I made the correct or the best choice. Each counselor was friendly and helpful but the information was different enough to be very confusing.

Online forms completion would be nice. Overall I got timely responses to questions and professional service. Thanks.

I have limited interaction with the Department and I do not know any area that needs improving at this time.

Overall the SCRS Service Purchase Department was very good. There was 1 form that should have been sent to a school, instead it was sent to me.

Being a new retiree (June 2002) I haven't had enough contact with the department to answer this question.

Assign employee to state employee for more personal touch and to be more familiar with a person's account for as many years as possible.

I do not know, I think my request for service was handled real well, this is what I think.

You can't improve upon a system that is already working to perfection! Prior to starting this retirement process I was apprehensive about working with a faceless, impersonal bureaucracy. However everyone I've spoken to at SCRS has been courteous, informative, knowledgeable and caring.

I have no complaints. This department has been nothing but pleasant to deal with.

I was completely and happily satisfied!

In my case I cannot think of any ways to improve this service. All of my interactions were carried out through the mail. Everything went like clockwork and surprised me at how quickly it was all handled. Thanks so much for your help. I have already started school again and everything is in place for me to begin TERI. Thanks again.

On my part nothing. They were great.

Continue to be courteous and efficient! Because the opportunity to purchase service was unexpected and I had practically no knowledge of the process the courtesy of the counselors was most impressive.

I believe the service this state agency provides is excellent! Although I did have to call for clarification regarding completion of a form the SCRS staff was courteous, patient and clear with their response. Other state agencies could use SCRS as a model relating to customer service! Keep up the great work!

Encourage local school districts to be prompt in turning in information on new retirees. I feel there is a lag in your ability to complete your work based on incomplete information from my school district.

Every 3 months give a status of how much you currently owe and how much you have paid.

SAMPLE LOG NOTES FROM CUSTOMER CONTACT LOG

- 1) MBR VERY ANGRY AT RECEIVING NOTIFICATION OF APP STATUS: CLOSED...SAID HE AND THE FORESTRY COMMISSION HAVE SENT THOUSANDS OF DOLLARS TO GET THIS IN ORDER, IT IS NOT HIS JOB TO DO THIS, WE DON'T KNOW WHAT WE'RE DOING, HE'S GOING TO CALL THE GOVERNOR WHO IS A FRIEND TO GET THIS STRAIGHTENED OUT...I ASKED IF I COULD ASSIST...HE SAID HE'S TIRED OF CALLING AND GETTING DIFFERENT ANSWERS, HE DOESN'T KNOW WHY THE LEFT HAND DOESN'T KNOW WHAT THE RIGHT HAND IS DOING...HUNG UP.
- 2) MEM INQ ABUT PURCHASING ACTIVE DUTY MILITARY...COMPLETED SP REQUEST AND ADV MEMBER TO GET SALARY VERIFICATION AS OF 1/10/00 AND SEND IN COPY OF DD214

RECEIVED A LETTER DATED 05/04/00 FROM THE SERV DEPT IN REF TO HIS INELIGIBILITY TO PURCHASE ACTIVE MILITARY SERVICE...MEMBER STATED THAT HE SPOKE WITH _____ DURING THE EARLY PART OF THE SUMMER IN REF TO THE MILITARY SERVICE..MBR WANTED TO USE THE 20 YRS OF MILITARY SERVICE AND WORK OR PURCHASE THE REMAINING YEARS OF SERVICE NEEDED TO MEET ELIGIBILITY TO RETIRE WITH SCRS.. I ADVISED THAT HE CANNOT USE THE SERVICE CREDIT FROM THE MILITARY..HE CAN PURCHASE THE SERVICE CREDIT..MEMBER STATED, "THE ENTIRE 20 YEARS"..I ADVISED YES..OOPS WOULD ONLY BE ELIGIBLE TO PURCHASE A MAXIMUM OF 6 YEARS MILITARY..I DID NOT GET BACK TO THIS POINT HOWEVER I DID CLEARLY STATE THAT HE CANNOT USE SERVICE TIME IN MILITARY..HE CAN PURCHASE SERVICE TIME TO ASSIST WITH MEETING ELIGIBILITY.....MEMBER CUT ME OFF AND ADVISED THAT IT APPEARS THAT I NOR _____ SEEMS TO BE VERY KNOWLEDGABLE ABOUT THE INFORMATION AND HE WILL CONSULT WITH ANOTHER SOURCE FOR THE CORRECT INFO...

- 3) RECD WORKERS COMP INVOICE..THOUGHT SHE COULD DO PAYROLL DEDUCTION ADVS THAT W/COMP PURCH ONLY IN LUMP SUM OR R/0...ARGUED THAT INVOICE STATES SHE COULD DO INSTALLMENT LOAN..ADVSD THAT INFO STANDARD ON INVOICE BUT NOT APPLICABLE FOR W/COMP PURCH...HOW MUCH SVC CREDIT IF SHE BUYS W/COMP...ADVSD AT END OF FY00 SHE WOULD HAVE 25-10-20. ASKED ABOUT HER 1975 SVC AT WALLACE ELEMENTARY...ADVSDSHE RECD 0-10-20 SVC CREDIT ALSO 1999 ONLY RECD 0-11-00 SVC CREDIT...ARGUED OVER SVC CREDIT...ADVSD HER TO CONTACT EMPLOYER ABOUT GETTING IT CORRECTED.
- 4) MBR WAS EXTREMELY OVERWHELMED WITH THE COST SHE RECEIVED IN 1999 TO PURCHASE NM SERVICE AND THE UPDATED COST TO PURCHASE PUBLIC SERVICE...MBR FELT SHE WAS NOT GIVEN ADEQUATE NOTIFICATION OF THE INCREASE IN SERVICE PURCHASE COST...ADVSD MBR TO THE SYSTEM UPDATES MAILED TO EMPLOYERS AND EMPLOYEES...

BE PREPARED TO THINK FOR MBR...MBR CALLED IN TO SEE ABOUT LTR SHE WROTE TO MR TOOMEY...ADVISED THAT I DID NOT SEE A LTR FROM MBR..IN LOOKING THRU DOC LTR WAS MISLABELED AS SER REQ...MBR STATED THAT SHE WAS SENT ANOTHER COPY OF INVOICE THAT EXPIRES 12-10-01..ADVISED THAT WE HAVE NOT REC'D SALARY..MBR BECAME FRUSTRATED AND STATED THAT SHE WILL GET HUSBAND TO CALL IN

WANTS APPT WITH ____ ..WILL HAVE TO TALK TO ____..TO CHECK 10 30TH DATE FOR APPT..WILL ALSO NEED TO SPEAK TO ____..WILL NOT NEED TO SET UP APPT FOR ____

WANTED AN APPT WITH ____ ADVSD I CANNOT MAKE A BY NAME APPT BUT I CAN SCHEDULE AN APPT AND SHE CAN ASK FOR ____ WHEN SHE GETS HERE...WANTED TO SPEAK WITH ____..ADVSD SHE IS IN TRAINING..SHE REPLIED THAT SHE WAS IN TRAINING LAST FRIDAY ALSO..YES..SAID TO HAVE ____ CALL HER

CALLED FOR ____ DID NOT WANT TO GIVE SSN...JUST NAME AND NUMBER EMAILED TO ____ TO CALL HER.

- 5) PUT IN REQ FOR NM AND ML SVC...RECD INSUFF LTR...WHAT IS NEEDED..HAVE NOT RECD YOUR INSTATE FORM FOR YOUR NM SVC..HAVE DD214 FOR MIL SVC. HAVE CURRENT SALARY VERIF...MBR STATES HE HAS NOT RECD A FORM TO COMPL FOR HIS NM SVC..MLD MBR A FORM 2122 TODAY..MBR ONLY WANTS TO PURCHASE HIS ML SVC PRIOR TO 1975 WHICH IS BASED ON HIS BEG SALARY...

ADVSD MBR WE NEED DOCUMENTATION TO VERIFY SERVICE..MBR SAYS SCHOOL RECORDS DESTROYED IN HURRICANE HUGO..REFERRED HIM TO SS OFFICE FOR FORM 7050

- 6) DENIED TO ESB VOLUNTEER FIRE DEPT SERVICE..WANTED TO KNOW WHY..TM SENT TO SER PUR DEPT 2-20-97.

PER TM FROM ____ 2-14-97 WILL RESEARCH FILE AND SHE WILL CALL MBR BACK

MBR WANTING TO SPEAK WITH ____ ..SAYS SERV IS MESSED UP..NOT APPLYING SERV CREDIT CORRECTLY.

EMP CALLED TO ASK WHY MBR NOT ABLE TO PURCHASE SER FROM 10-18-83...? EMAIL SENT TO ____ TO LET ____ KNOW TO CALL EMP BACK.

- 7) MBR CALLING TO SEE IF SHE CAN PURCH THE SERV SHE WORKED AT MCLEOD, TUOMEY HOSPITALS...EXPLAINED TO MBR THAT THE HOSPITALS MUST BE MEMBERS OF SCRS FOR HER TO BE ELIGIBLE TO PURCHASE THE SVC (INCORRECT) ...LOOKED UP THE HOSPITALS AND DO NOT SEE THEM AS MBRS

PLAN TO RETIRE 1/17 UNDER DHEC RET INCENTIVE...REQUESTING TO PURCHASE PUBLIC SERVICE FROM HOSPITAL THAT SHE WORKED FOR..ADVSD THT I WILL MAIL 2122 AND 2101 FOR COMPLETION..ADVISED THAT SHE WOULD NEED TO SEND FORMS TO SERV BEFORE DOR..ADVISED THAT SERV MUST BE

PAID IN FULL PRIOR TO DOR...ADVISED THAT SERV DEPT WILL MAKE DETERMINATION IF SERV ELIGIBLE FOR PURCHASING..STATED THAT MONEY SHE PAID FOR NON QUALIFIED SERVICE SHOULD GO TOWARDS PUBLIC SERVICE FROM HOSPITAL.

SHE WAS GETTING PRETTY HEATED UP...TRYING TO GET ANSWERS...OFFERED TO ASSIST AND SHE BEGRUDGINGLY TOLD ME HER TALE...BOTTOM LINE..SHE WANTS TO TAKE MONEY SHE HAS PUT TWRD NQ TIME AND BUY HER PUBLIC SERVICE..AND GET REFUND OF DIFFERENCE..AND WANTS ANSWER IF SHE CAN. ADVISED CANNOT ANSWER BASED ON QUESTIONS..GET ALL OF HER VERIFICATIONS, COPY OF CHARTERS OF THESE HOSPITALS, CUR SAL, ETC AND WRITE LETTER STATING THAT SHE DID NOT KNOW SHE COULD BUY THIS PUBLIC SERVICE...

CUSTOMER SERVICE CALL CENTER SURVEY

1. What are the most frequent questions you hear from members concerning Service Purchase?

I'd like to buy service. No clue on types of service purchase.

Cost to purchase service

Why does it cost so much to purchase service?

When will I receive an invoice?

What accounts will you accept for rollover?

If invoice expires in six months and I rollover money to pay for part of service purchase can I make other payment by deadline date in small payments until balance is paid by invoice end date?

2. What are the most frequent complaints you hear from members concerning Service Purchase?

Understanding that if buying service to meet Retirement Eligibility, their service must be paid in full prior to their DOR.

Why does it take so long to receive an invoice?

Having problems getting verification from other states or agencies in SC.

Bus drivers being calculated on minimum wage and not a full year when they drove a bus the full year.

Can't get information in a timely manner to SCRS-wants extension of deadline to provide information..wants to extend 90 day period.

3. How in your opinion can the Service Purchase Department improve processes to decrease customer confusion and complaints?

Provide a checklist to the member on what forms to complete and where they need to be sent for verification.

4. How can the Service Purchase Department make your job easier?

Notes on forms reason not eligible to purchase service

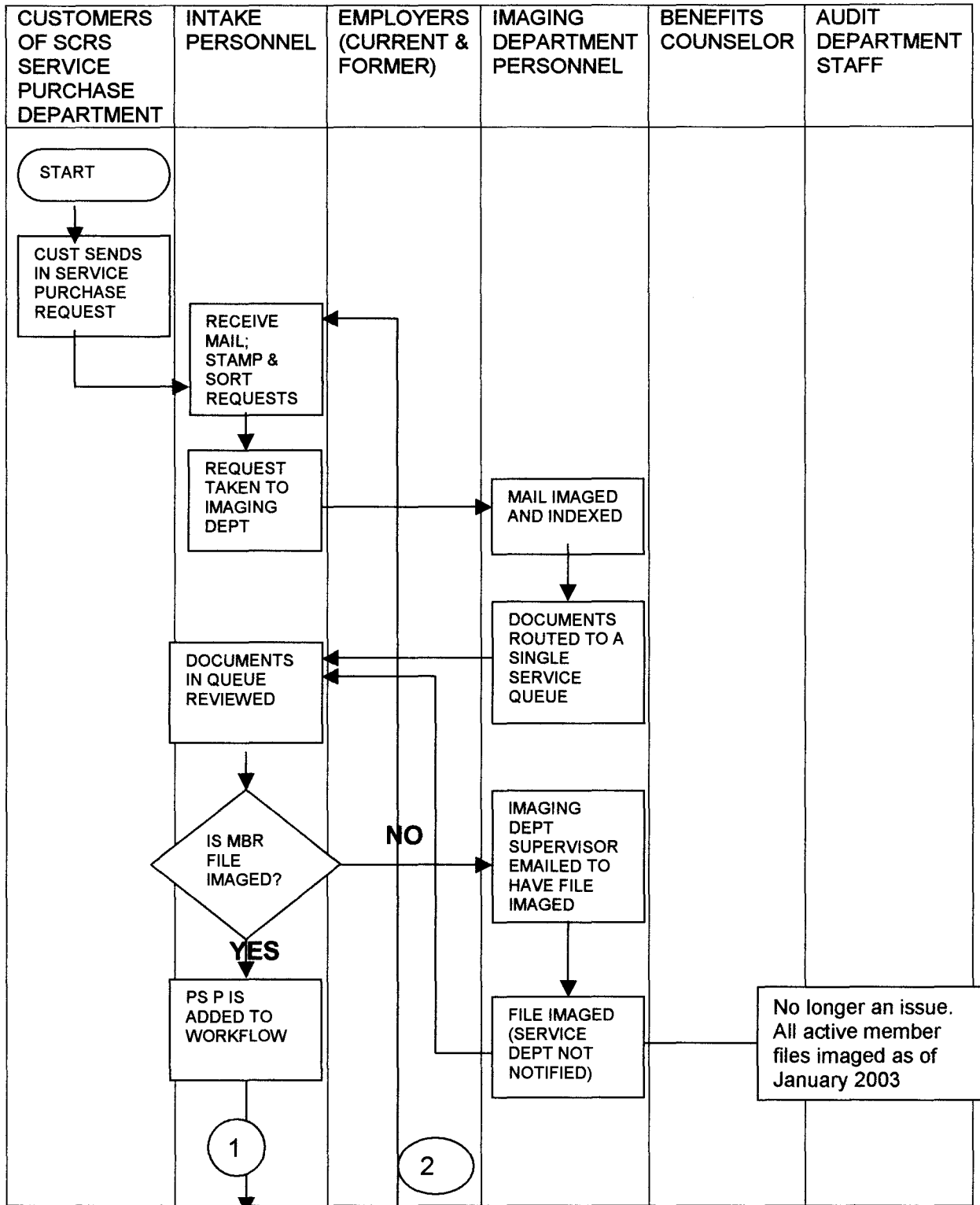
How calculated when different than normal step by step

Break down that can relate to member and member understand

I have no problems with Purchase Department

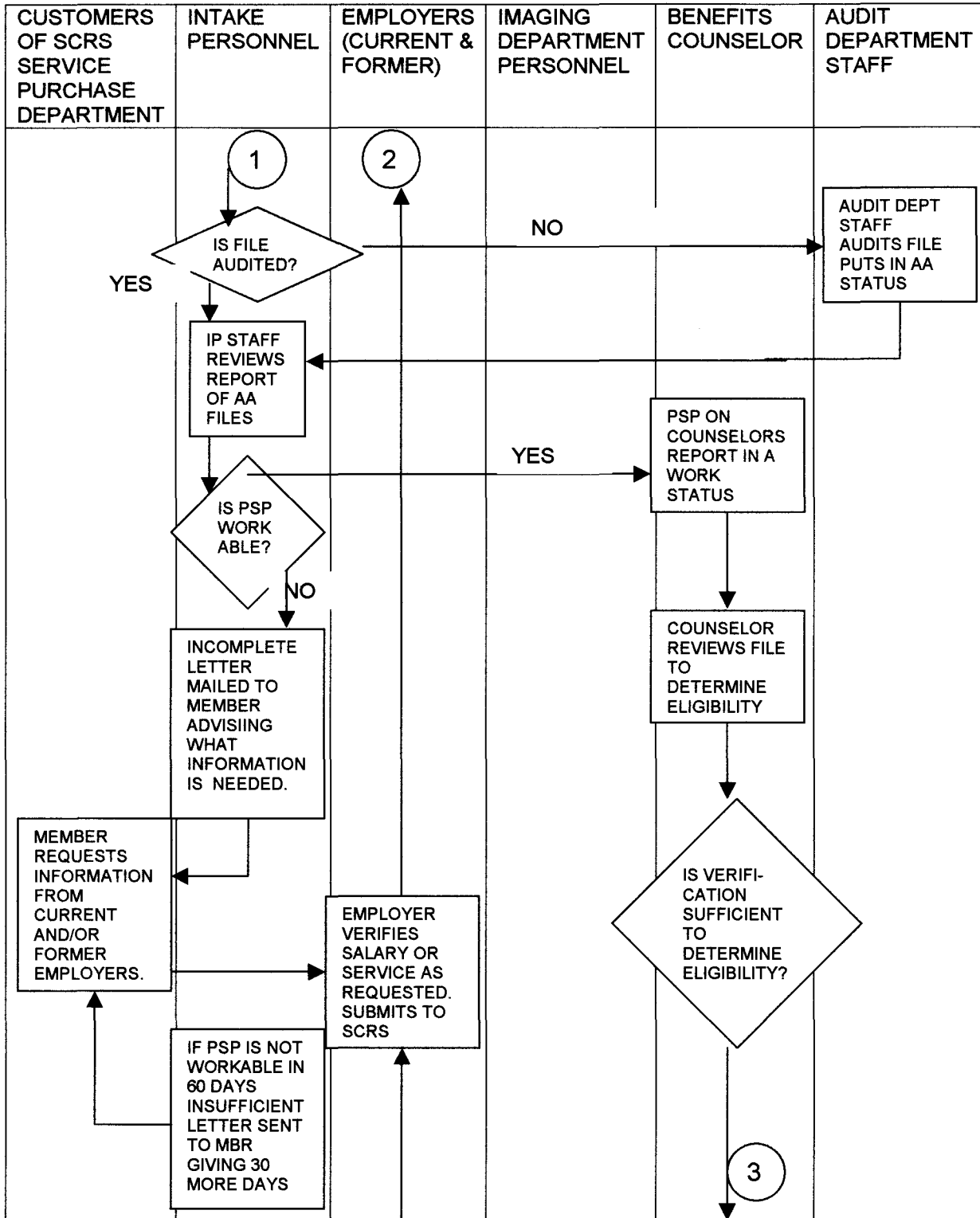
Provide instructions for persons rolling over other retirement funds to purchase service

ADDITIONAL COMMENTS:

SCRS SERVICE PURCHASE DEPLOYMENT FLOWCHART

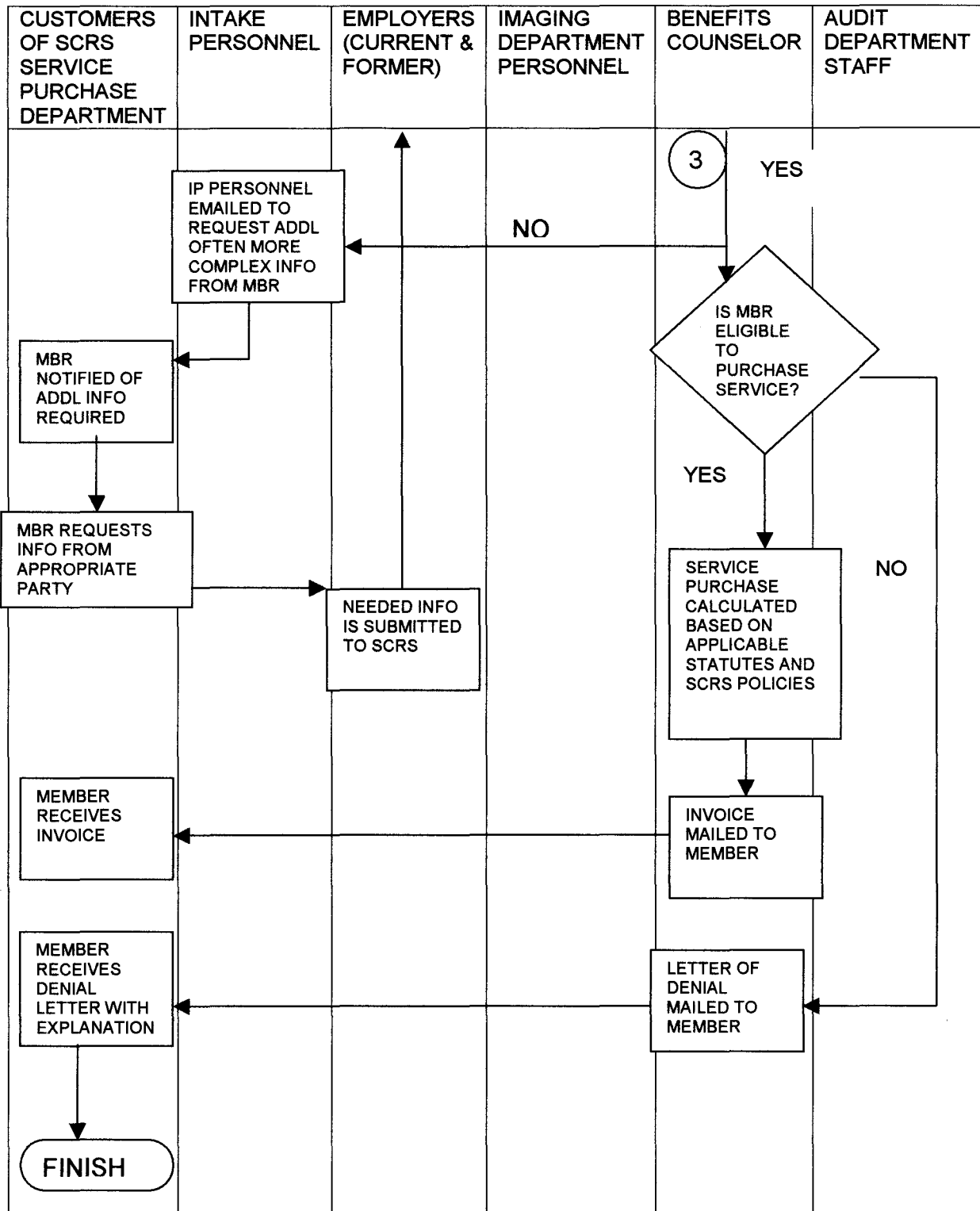
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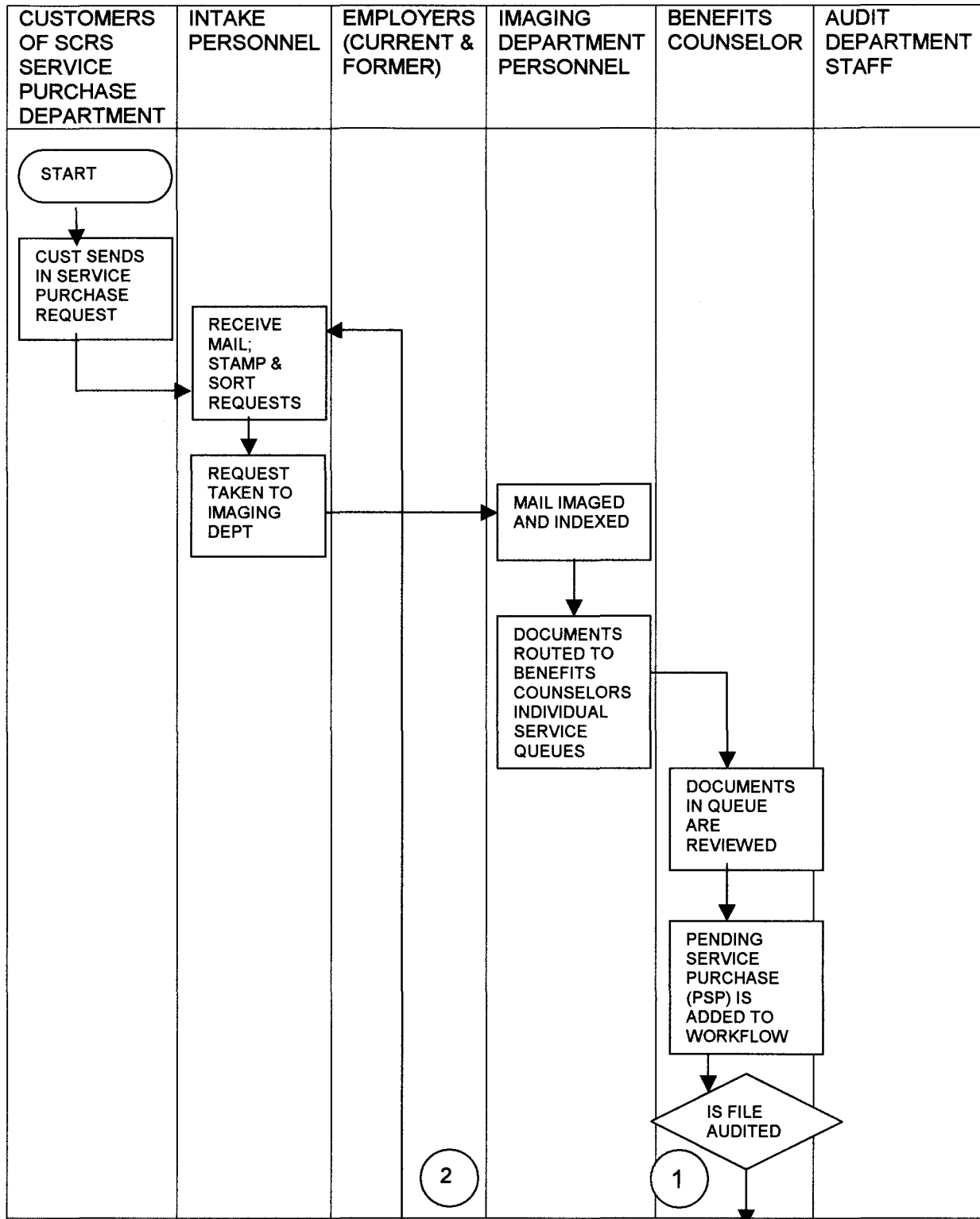
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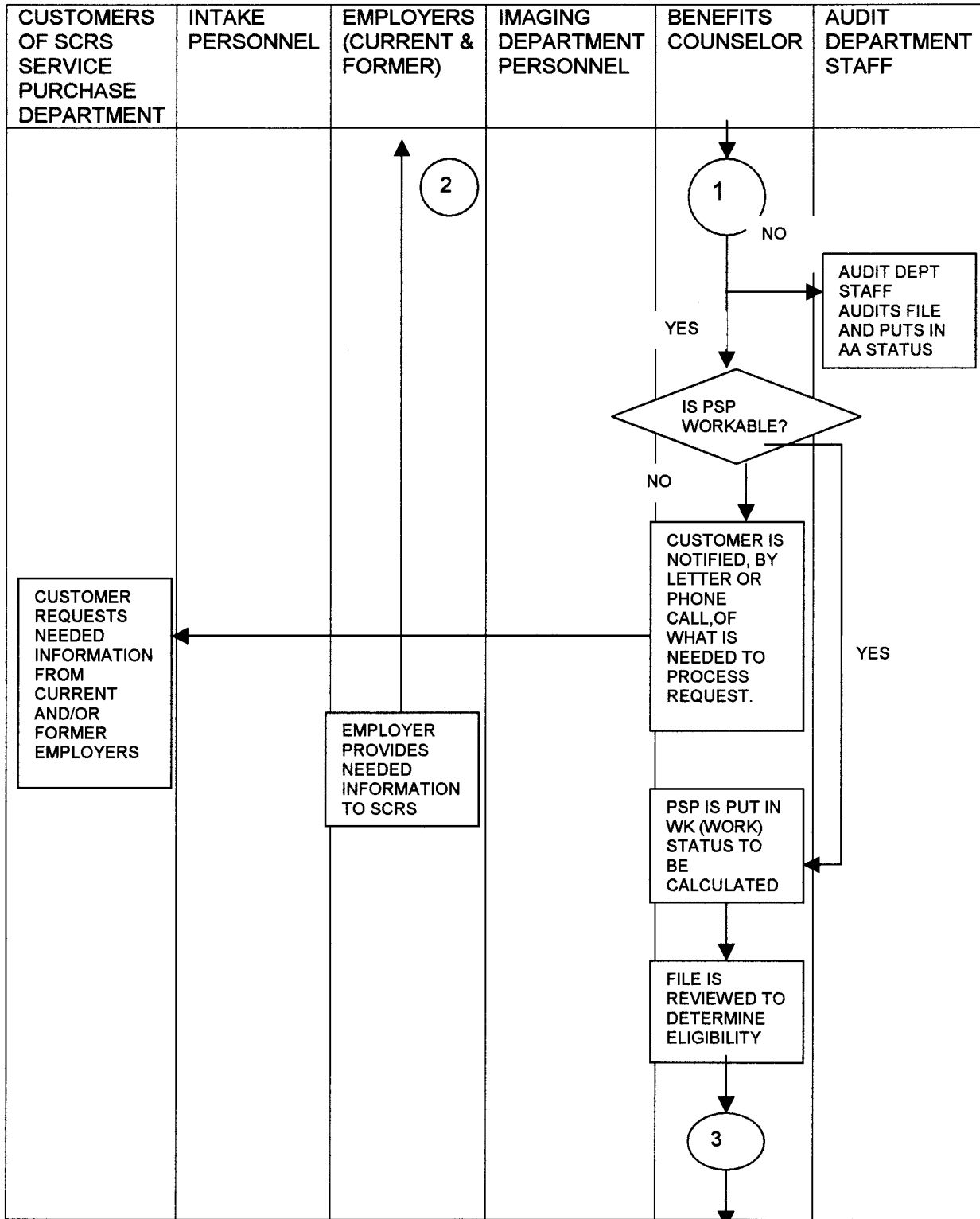


Appendix F

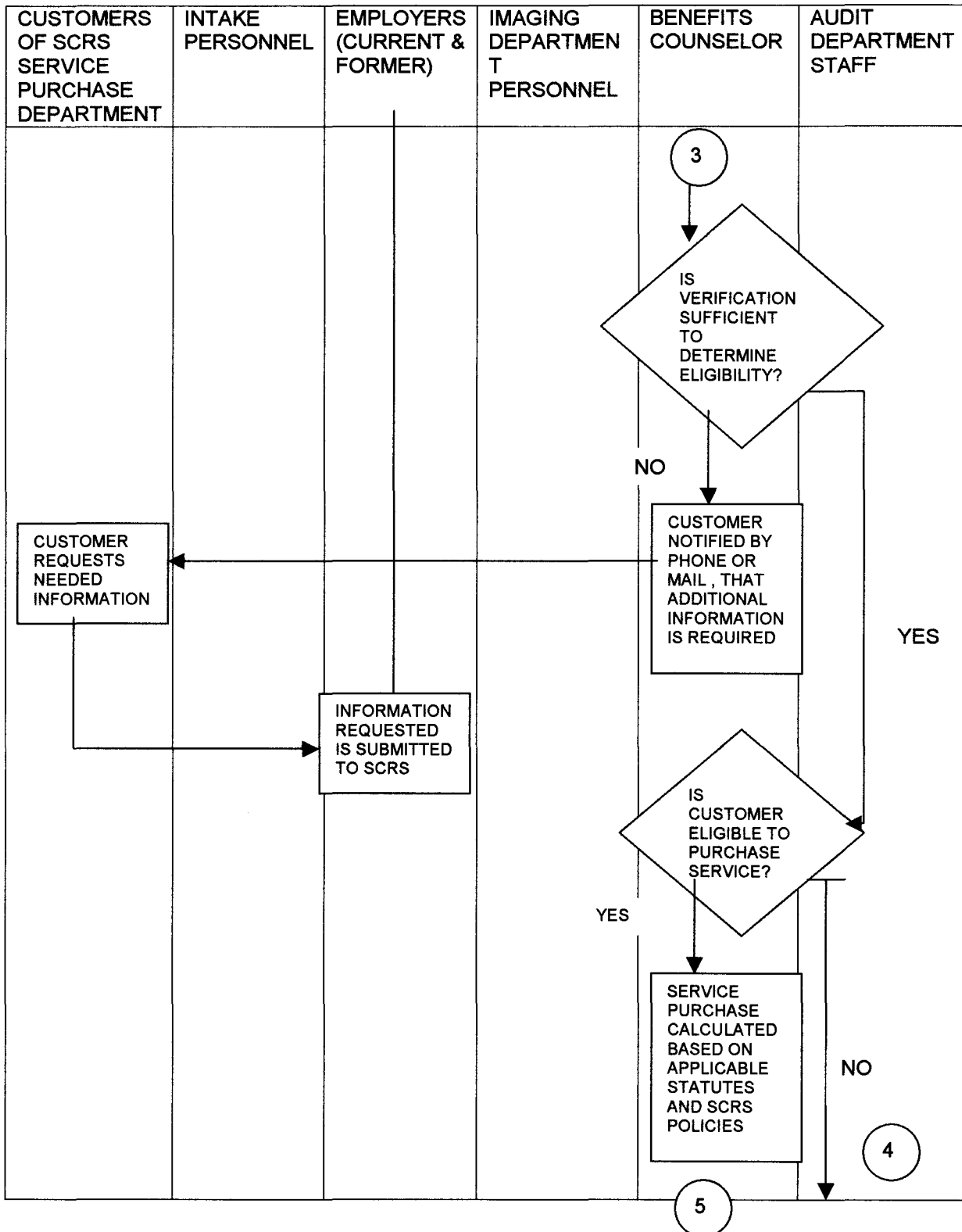
SCRS SERVICE PURCHASE DEPLOYMENT FLOWCHART
PROPOSED IMPROVEMENTS



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